

Claims

- [c1] 1. A method for performing business planning using a structured process, so as to provide a marketing solution to an organization, comprising the steps of:
- in a first stage, chartering the process by defining its objective based on input from at least one senior leader of the organization, and developing a plan for collecting data to reach that objective;
 - in a second stage, gathering data pertaining to the organization's environment from secondary and primary sources, and performing preliminary structuring and assessment of such data;
 - in a third stage, conducting a strategic workout session with the at least one senior leader, including developing, bundling and prioritizing candidate solutions; and
 - in a fourth stage, conducting a tactical workout session, including allocating resources to implement a selected solution.
- [c2] 2. The method of claim 1, wherein the first stage further includes performing a SWOT analysis procedure, the SWOT analysis procedure comprising the steps of:
- identifying strengths and weaknesses relevant to the organization;
 - identifying opportunities presented to the organization, and threats facing the organization; and
 - identifying candidate solutions based on a consideration of the identified strengths, weaknesses, opportunities, and threats.
- [c3] 3. The method of claim 1, wherein the first stage further includes performing a strategy prioritization procedure, comprising the steps of:
- identifying a plurality of strategies for achieving the marketing solution, wherein the procedure defines a plurality of variables that describe respective properties of the strategies;
 - specifying values for the variables which reflect the extent to which the strategies embody the properties;
 - summing the values for each of the strategies to produce a plurality of sum

values; and

ranking the strategies based on the plurality of sum values.

[c4] 4. The method of claim 3, wherein the step of specifying values comprises specifying values selected from a predefined group of delimiter values associated with respective factual patterns.

[c5] 5. The method of claim 1, wherein the second stage further includes performing a market prioritization procedure, comprising:
identifying a plurality of markets for achieving the marketing solution, wherein the procedure defines a plurality of variables that describe respective properties of the markets;
specifying values for the variables which reflect the extent to which the markets embody the properties;
summing the values for each of the markets to produce a plurality of sum values; and
ranking the markets based on the plurality of sum values.

[c6] 6. The method of claim 5, wherein the step of specifying values comprises specifying values selected from a predefined group of delimiter values associated with respective factual patterns.

[c7] 7. The method of claim 1, wherein the second stage further includes performing a multi-blocker model procedure, comprising:
identifying the attractiveness of a plurality of candidate solutions;
identifying the business strengths of the plurality of candidate solutions; and
placing indicia representing the candidate solutions on a grid as a function of the identified attractiveness and strengths of the respective plurality of candidate solutions.

[c8] 8. The method of claim 1, wherein the third stage further includes performing a risk verses newness procedure, comprising:
identifying the level of newness to the organization with respect to a plurality of candidate solutions;

identifying the level of newness to the market with respect to the plurality of candidate solutions, with respect to a plurality of marketing domains; and placing indicia representing the candidate solutions on a grid as a function of the solutions" identified newness to the organization and newness to the market.

[c9]

9. A method for performing business planning using a structured process, so as to provide a marketing solution to an organization, comprising the steps of:

in a first principal step, chartering the process and defining its objectives on the basis of information obtained from at least one senior leader of the organization;

in a second principal step, gathering baseline information that defines the current position of the organization;

in a third principal step, developing strategy hypotheses and a data collection plan for achieving the objectives identified in the first principal step;

in a fourth principal step, collecting and analyzing previously prepared data from secondary data sources;

in a fifth principal step, collecting data from primary sources using resources that are internal to the organization;

in a sixth principal step, collecting data from primary sources that are external to the organization;

in a seventh principal step, combining and analyzing information extracted in at least the fourth through sixth principal steps;

in an eighth principal step, identifying and assessing opportunities for providing the marketing solution;

in a ninth principal step, reviewing and generating opportunities by conducting a strategic planning session with at least one senior leader of the organization;

in a tenth principal step, assessing and prioritizing the opportunities identified in the prior principal steps;

in an eleventh principal step, developing a high-level plan for carrying out the marketing solution;

in a twelfth principal step, developing a measurement system and assessing risk in connection with implementing the marketing solution;

in a thirteenth principal step, determining criteria for assessing the success of the solution and projecting the impact of changes in the organization that will be caused by the solution; and

in a fourteenth principal step, developing detailed action plans to implement the solution.

- [c10] 10. A method for performing business planning so as to provide a marketing solution to an organization, comprising the steps of:
- storing a kit, the kit including:
 - a representation of a structured process for developing the market solution, the structured process prompting a user to apply tools at specified junctures in the process;
 - a plurality of tools for use in performing the process;
 - accessing the kit; and
 - using the kit by performing the process specified in the kit using at least one of the tools contained in the kit,
- wherein the process prompts a user to perform the steps of:
- in a first stage, chartering the process by defining its objective based on input from at least one senior leader of the organization, and developing a plan for collecting data to reach that objective;
 - in a second stage, gathering data pertaining to the organization's environment from secondary and primary sources, and performing preliminary structuring and assessment of such data;
 - in a third stage, conducting a strategic workout session with the at least one senior leader, including developing, bundling and prioritizing candidate solutions; and
 - in a fourth stage, conducting a tactical workout session, including allocating resources to implement a selected solution.

- [c11] 11. The method according to claim 10, wherein the step of storing comprises storing the kit in an electronic storage medium.
- [c12] 12. The method according to claim 11, wherein the step of accessing comprises accessing the kit using a computer workstation.
- [c13] 13. The method according to claim 12, where the step of using comprises interacting with the representation of the process and the plurality of tools using the computer workstation.
- [c14] 14. A kit for performing business planning so as to provide a marketing solution to an organization, comprising:
a representation of a structured process for developing the marketing solution, the structured process prompting a user to perform tools at specified junctures in the process; and
a plurality of tools for use in performing the process,
wherein the process prompts the user to perform the steps of:
in a first stage, chartering the process by defining its objective based on input from at least one senior leader of the organization, and developing a plan for collecting data to reach that objective;
in a second stage, gathering data pertaining to the organization's environment from secondary and primary sources, and performing preliminary structuring and assessment of such data;
in a third stage, conducting a strategic workout session with the at least one senior leader, including developing, bundling and prioritizing candidate solutions; and
in a fourth stage, conducting a tactical workout session, including allocating resources to implement a selected solution.
- [c15] 15. The kit of claim 14, where the plurality of tools includes a SWOT analysis tool, the SWOT analysis tool being configured to prompt the user to:
identify strengths and weaknesses relevant to the organization;
identify opportunities presented to the organization, and threats facing the organization; and

identify candidate solutions based on a consideration of the identified strengths, weaknesses, opportunities, and threats.

- [c16] 16. The kit of claim 14, wherein the plurality of tools includes a strategy prioritization tool, the strategy prioritization tool being configured to prompt the user to:
- identify a plurality of strategies for achieving the marketing solution, wherein the procedure defines a plurality of variables that describe respective properties of the strategies;
 - specify values for the variables which reflect the extent to which the strategies embody the properties;
 - sum the values for each of the strategies to produce a plurality of sum values; and
 - rank the strategies based on the plurality of sum values.

- [c17] 17. The kit of claim 16, wherein the tool is configured to restrict the specified values to a predefined group of delimiter values associated with respective factual patterns.

- [c18] 18. The kit of claim 14, wherein the plurality of tools includes a market prioritization tool, the market prioritization tool being configured to prompt the user to:
- identify a plurality of markets for achieving the marketing solution, wherein the procedure defines a plurality of variables that describe respective properties of the markets;
 - specify values for the variables which reflect the extent to which the markets embody the properties;
 - sum the values for each of the markets to produce a plurality of sum values;
 - and
 - rank the markets based on the plurality of sum values.

- [c19] 19. The kit of claim 18, wherein the tool is configured to restrict the specified values to a predefined group of delimiter values associated with respective factual patterns.

[c20] 20. The kit of claim 14, wherein the plurality of tools includes a multi-blocker tool, the multi-blocker tool being configured to prompt the user to: identify the attractiveness of a plurality of candidate solutions; identify the business strengths of the plurality of candidate solutions; and place indicia representing the candidate solutions on a grid as a function of the identified attractiveness and strengths of the respective plurality of candidate solutions.

[c21] 21. The kit of claim 14, wherein the plurality of tools includes a risk verses newness tool, the risk verses newness tool being configured to prompt the user to: identify the level of newness to the organization with respect to a plurality of candidate solutions; identify the level of newness to the market with respect to the plurality of candidate solutions, with respect to a plurality of marketing domains; and place indicia representing the candidate solutions on a grid as a function of the solutions" identified newness to the organization and newness to the market.

[c22] 22. The kit of claim 17, wherein the kit is formed by digital data.

[c23] 23. A kit for performing business planning so as to provide a marketing solution to an organization, comprising: a representation of a structured process for developing the marketing solution, the structured process prompting the user to use tools at specified junctures in the process; and a plurality of tools for use in performing the process, wherein the process prompts a user to perform the steps of: in a first principal step, chartering the process and defining its objectives on the basis of information obtained from at least one senior leader of the organization; in a second principal step, gathering baseline information that defines the current status of the organization;

in a third principal step, developing strategy hypotheses and a data collection plan for achieving the objectives identified in the first principal step;

in a fourth principal step, collecting and analyzing previously prepared data from secondary data sources;

in a fifth principal step, collecting data from primary sources using resources that are internal to the organization;

in a sixth principal step, collecting data from primary sources that are external to the organization;

in a seventh principal step, combining and analyzing information extracted in at least the fourth through sixth principal steps;

in an eighth principal step, identifying and assessing opportunities for providing the marketing solution;

in a ninth principal step, reviewing and generating opportunities by conducting a strategic planning session with at least one senior leader of the organization;

in a tenth principal step, assessing and prioritizing the opportunities identified in the prior principal steps;

in an eleventh principal step, developing a high-level plan for carrying out the marketing solution;

in a twelfth principal step, developing a measurement system and assessing risk in connection with implementing the marketing solution;

in a thirteenth principal step, determining criteria for assessing the success of the plan and projecting the impact of changes in the organization on the solution; and

in a fourteenth principal step, developing detailed action plans to implement the solution.

[c24]

24. A system for performing a business planning method so as to provide a marketing solution to an organization, comprising:

a database for storing a kit, the kit including:

a structured process for developing the marketing solution, the

structured process prompting a user to apply tools at specified junctures in the process;

a plurality of tools for use in performing the process;

an access device for receiving the kit and for performing the process using the access device,

wherein the process prompts a user to perform the steps of:

in a first stage, chartering the process by defining its objective based on input from at least one senior leader of the organization, and developing a plan for collecting data to reach that objective;

in a second stage, gathering data pertaining to the organization's environment from secondary and primary sources, and performing preliminary structuring and assessment of such data;

in a third stage, conducting a strategic workout session with the at least one senior leader, including developing, bundling and prioritizing solutions; and

in a fourth stage, conducting a tactical workout session, including allocating resources to implement a selected solution.

[c25]

25. The system of claim 24, wherein the access device comprises a computer workstation.